

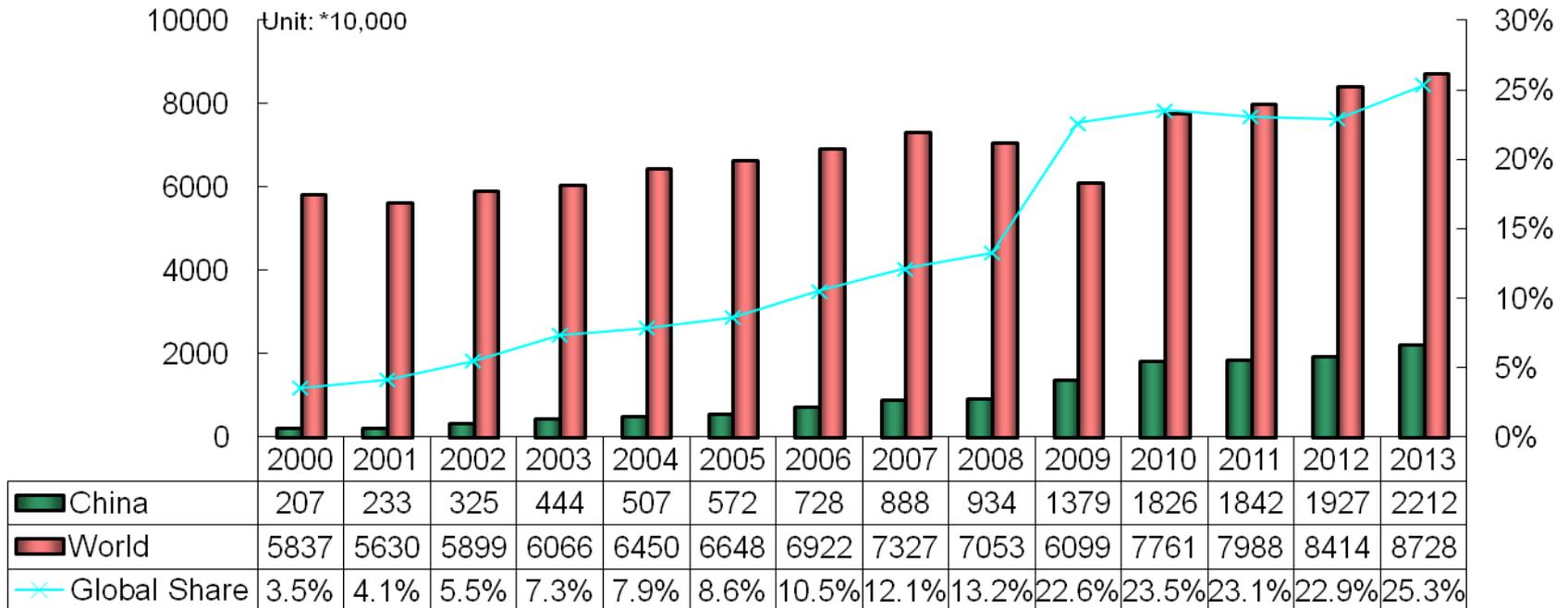
Current Situation of Chinese Automotive Industry

China Association of Automobile Manufacturers
(CAAM)

Oct. 2014, Seoul

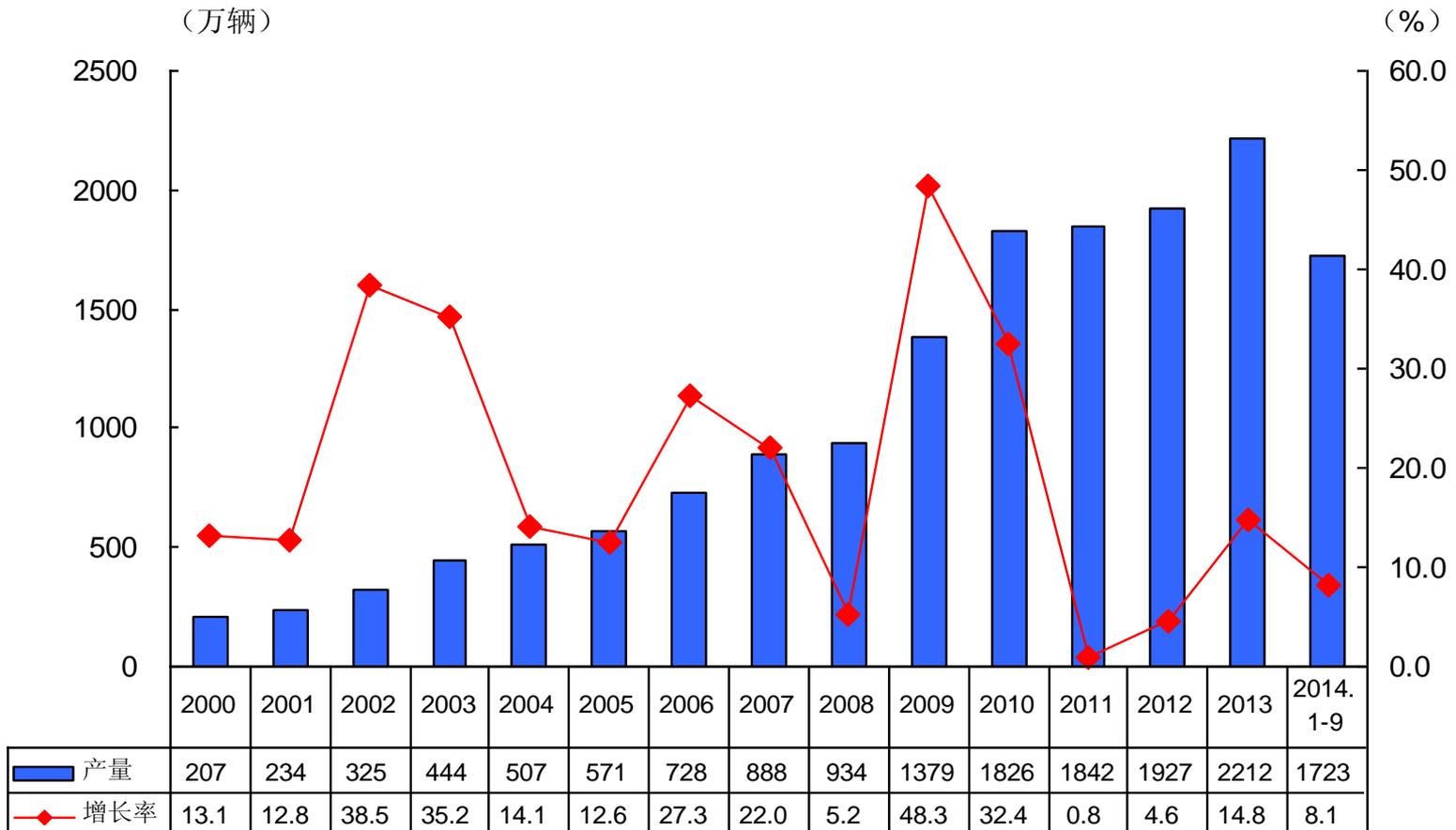
For China, its global share on new vehicle production increasing year after year

China & World Auto Production (2000-2013)



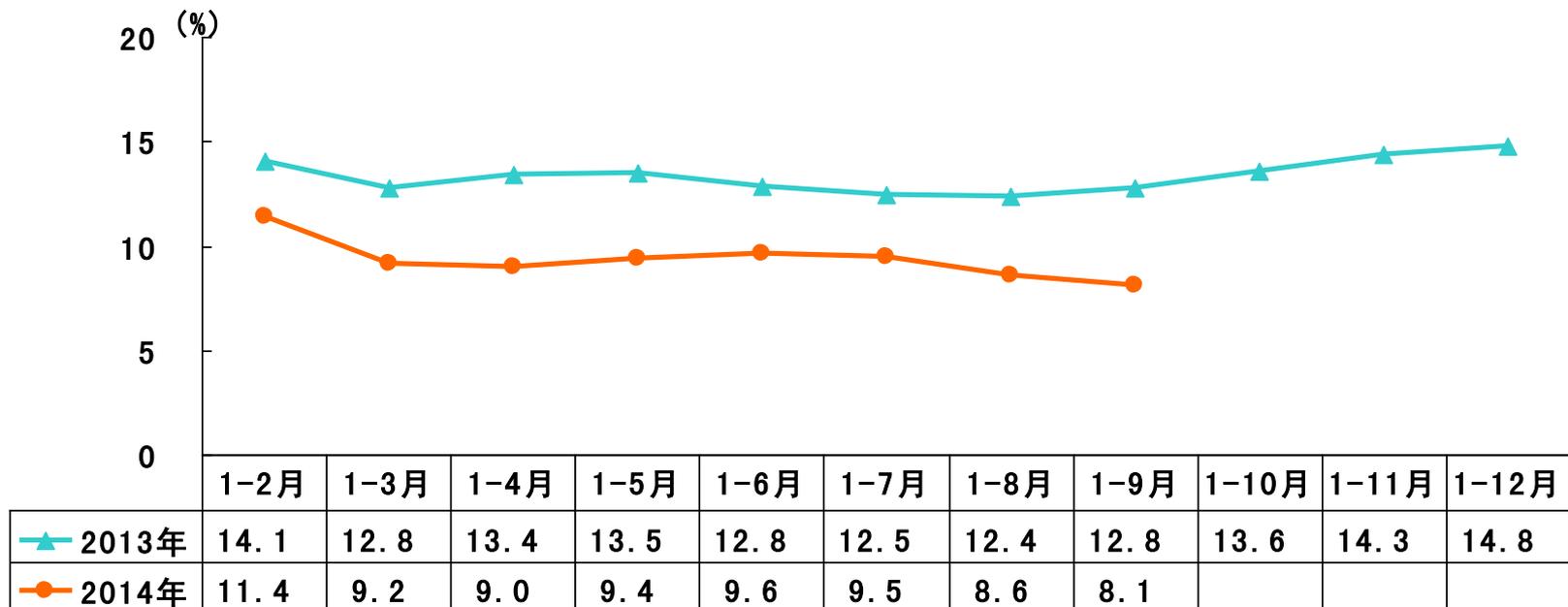
Production growth in 2014 lower than that of in 2013

Auto Production in China (2000-2013 and 2014. 1-9)



In 2014, monthly growth of Chinese auto production slowed down

Accumulative Growth Rate of Auto Production



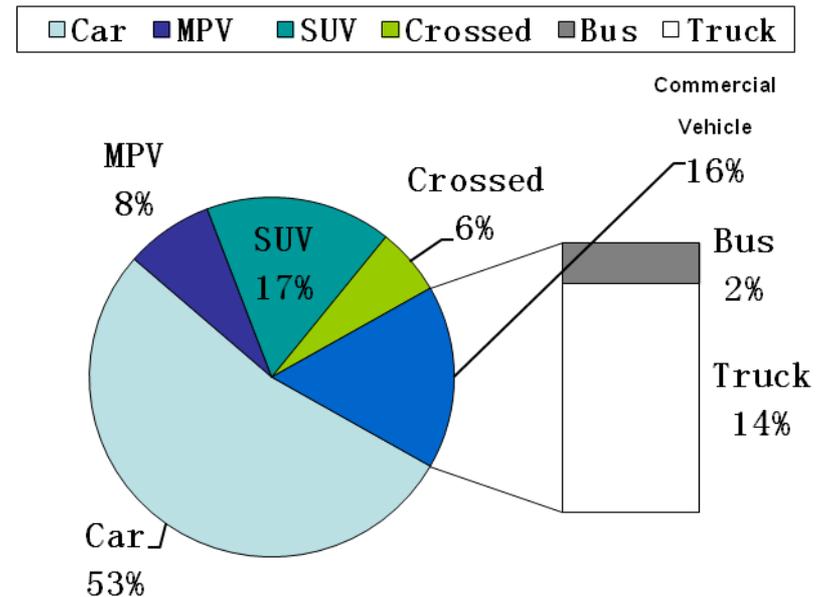
Production of automobiles in China (Jan-Sept 2014)

Production for the first nine months

Units: 10000, %

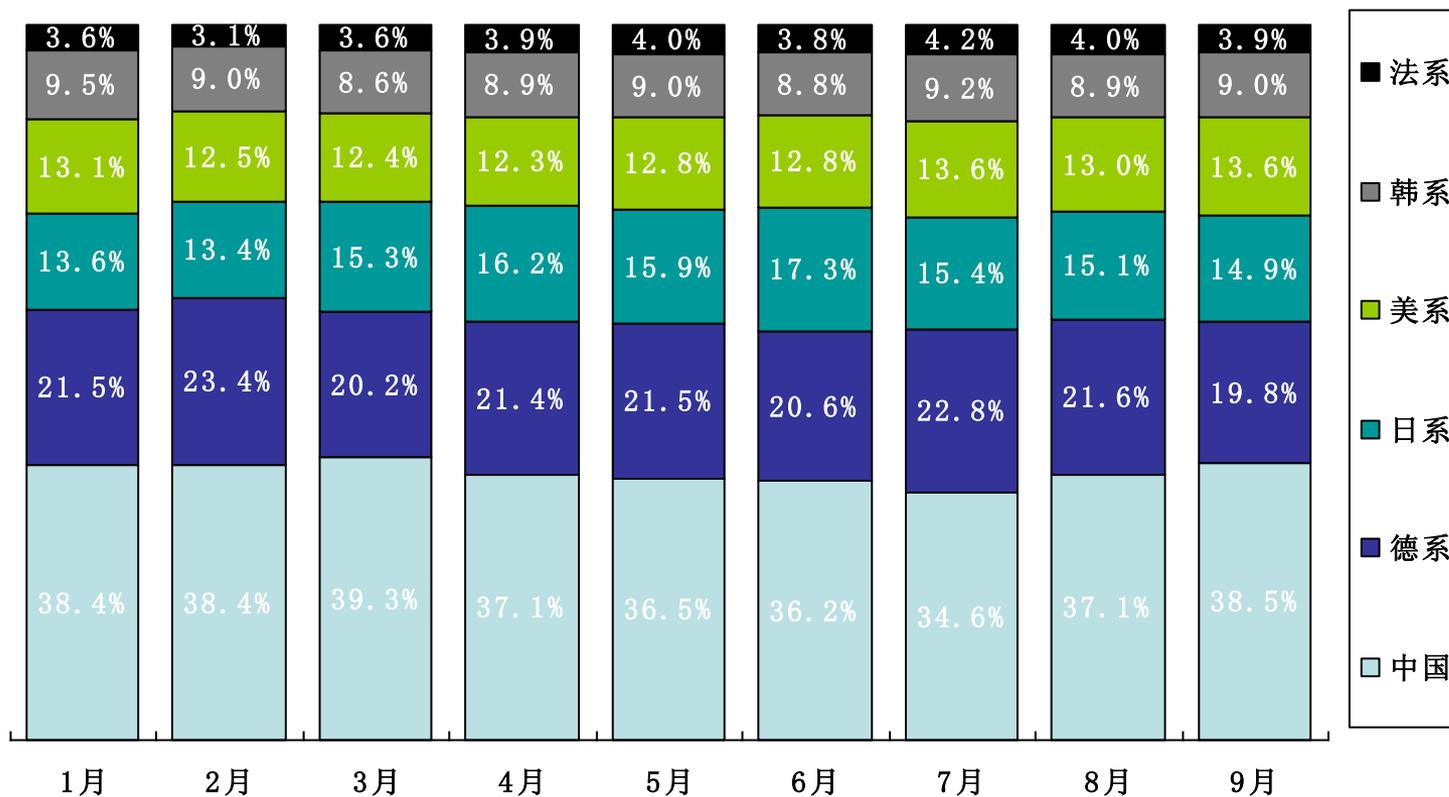
	Jan-Sept	Yearly Growth
Automobiles	1722.59	8.1
PC	1438.62	11.3
Car	915.67	5.1
MPV	135.14	55.7
SUV	284.44	34.7
Crossed Passenger Car	103.37	-16.5
CV	283.97	-5.7
Bus	43.12	6.8
Truck	240.85	-7.7

Product Composition (Jan-Sept)



PC market share in China

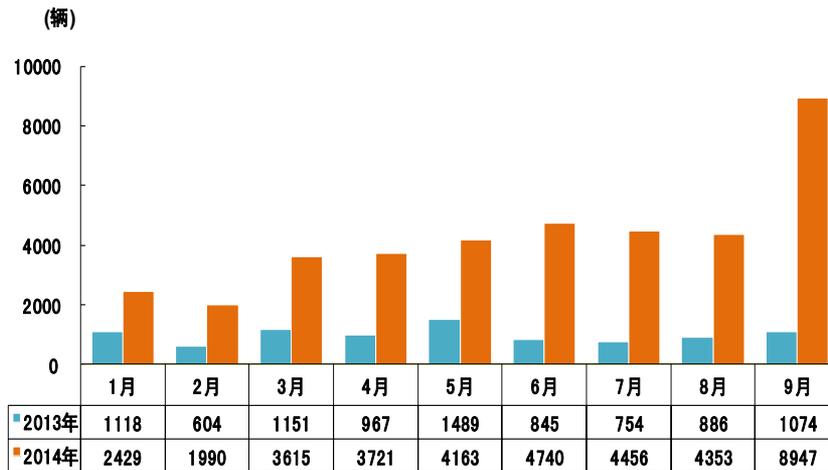
Monthly Comparison



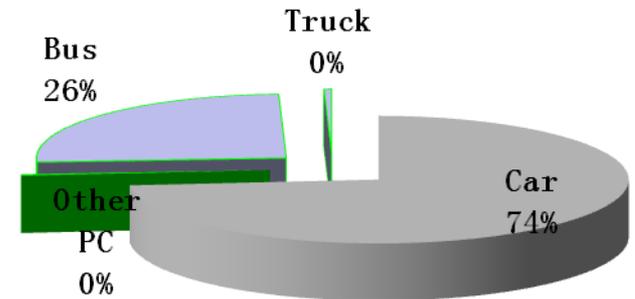
A rapid growth in sales and production of Chinese new energy vehicles

- According to the statistics of CAAM, for the first nine months, the production and sales of new energy vehicles reached 38,522 units (BEV 22,747 units; PHEV 15,775 units) and 38,163 units (BEV 22,258 units; PHEV 15,905 units) respectively, increasing 2.9 times and 2.8 times year on year. Look into different quarters, the production and sales of Q1 increased 1.8 times and 1.6 times year on year, and Q2 increased 2.7 times and 2.9 times, Q3 increased 3.9 times and 3.8 times.

Monthly Production of New Energy Vehicles



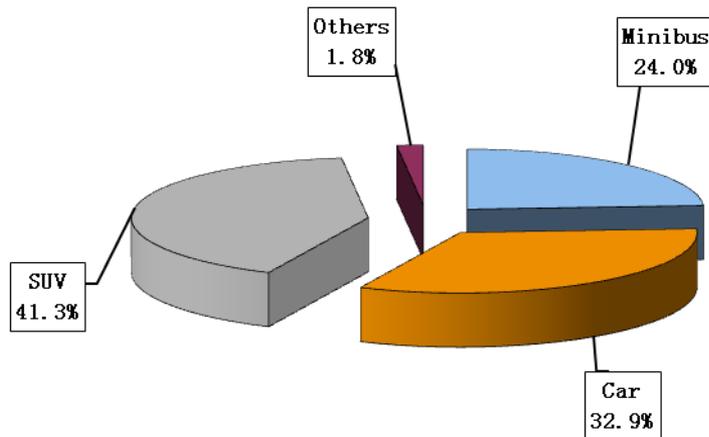
Production Composition in Jan-Sept



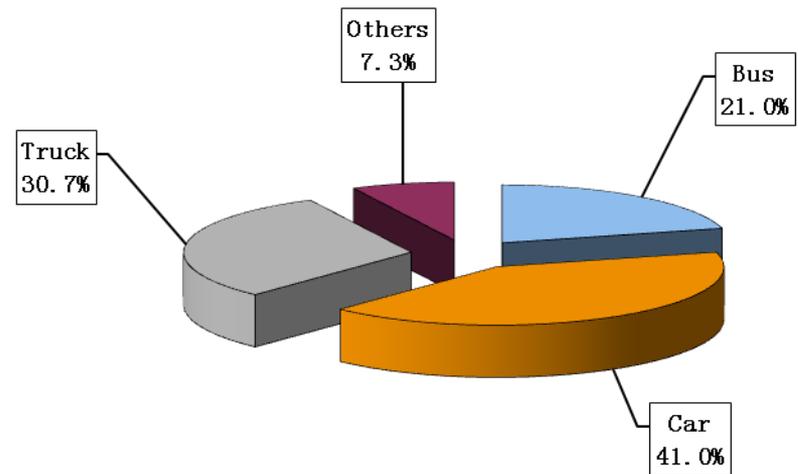
Auto export: yearly decline

• According to the customs data, for the first eight months of this year, the accumulated auto imports reached 954,800 units, up 28.8% year on year; while the exports were 601,300 units, down 6.0% year on year.

Imports Share by Type in Jan-Aug



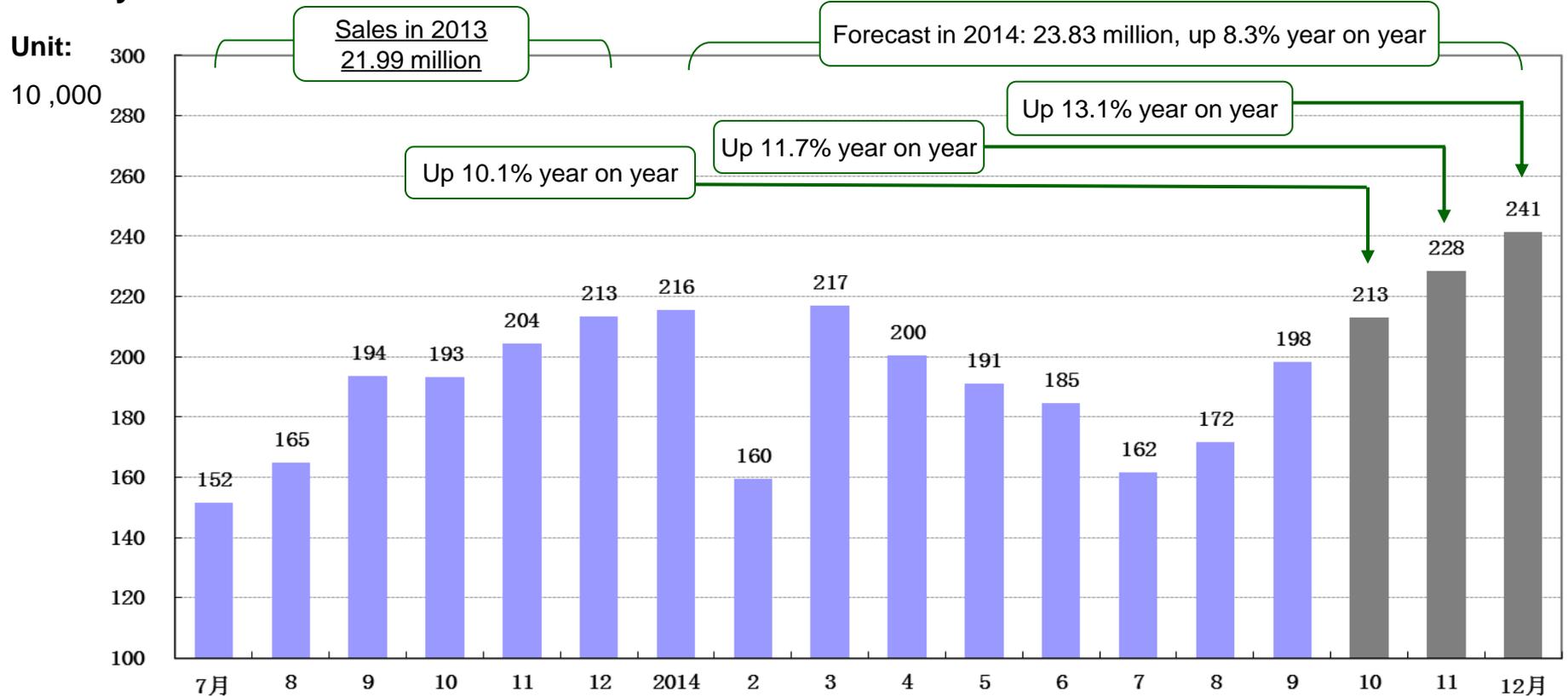
Exports Share by Type in Jan-Aug



Overall Market Forecast: It is estimated that the sales will reach **23.83 million** in 2014, up 8.3% year on year.

- The sales of Q4 will be 6.83 million, up 11.7% year on year

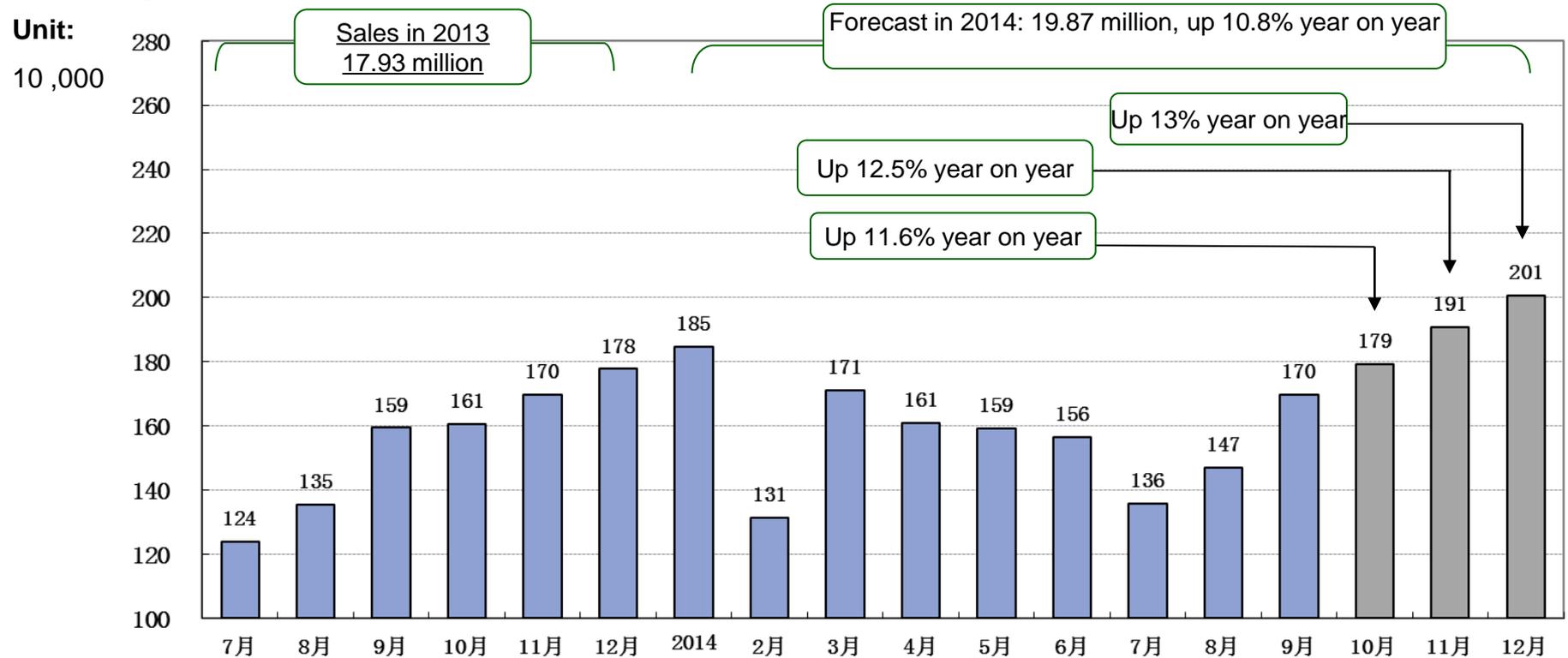
Monthly Sales



PC Forecast: It is estimated that the sales will reach **19.87 million** in 2014, up 10.8% year on year.

- The sales of Q4 will be 4.59 million, up 12.4% year on year (Q4 in 2013 up 12.7% year on year)

Monthly Sales



CV Forecast: It is estimated that the sales will reach **3.96 million** in 2014, down 2.5% year on year.

- The sales of Q4 will be 1.12 million, up 8.3% year on year (Q4 in 2013 up 9.5% year on year)

Monthly Sales

